User Guide

Registration

Click the green Start Your Free Trial Here button on the main Hallmaster website and enter the required information. Once you have registered, you will be sent an email to the email address you gave during the registration period with your user information for your records.

Account Setup

Once logged in, you will see the Dashboard and a series of panels guiding you what you need to do to set up your account. Please complete these sections in order. Tip: You can always go back and make changes to all sections of your account in the future so no need to worry if you don't have all the information at hand.

In order to make this process to be as quick and simple as possible, you should follow the steps in the correct order:

1. Create your Hall or Venue
2. Create your administrator roles (optional)
3. Create your Hire Charge Rates
4. Create your Rooms and Facilities
5. Create a list of Activity Groups
6. Add your list of Additional Line Items (Invoicing Module only)
7. Add your list of Customers
8. Add your current bookings
9. Generate your Invoices (Invoicing Module only – separate instructions)
10. Integrate Hallmaster with your own website

Step 1 - Create your Hall or Venue – *Manage Halls*

Using the pencil 'edit' icon on the right of your Hall name, enter the details for the physical location of your Hall or Venue including the name, address and contact information plus a description of the premises and upload any pictures or logo if you want.

You can create and include your own signature messages. These will be automatically included at the foot of the Booking Confirmation and Invoice Confirmation respectively and can be changed anytime. For example: ask for cheques to be posted to the Treasurer's address etc.

They can also include images and links to other websites, including PayPal where you could ask your customers to pay you using this method if you have a PayPal account. Please note: The signature you create will appear the same way in the auto-generated email confirmations, but will appear only as text on the Invoice PDF attachment, if this module is enabled (contact us for more information)

Additional Booking Form Items – eg Alcohol Licence, PRS Licence etc - Tick the items that you wish to appear in the online booking form.

T's & Cs – Here you can put a link to the Terms & Conditions page or document on your own website. When you enter the address here, it will automatically place a link to your T&C page or document, and a tick box that your customers need to tick before they can proceed and make a booking request.

Booking page link – If you have a specific page on your website, place the address here. This will link from the listings on our website straight to that page.

Invoice Prefix and Invoice Start Number – If using the Invoicing, these will appear automatically on your invoices. The number will increment each time you create a new invoice and can be reset whenever you want. Eg Year End. Example: FVH-2015-0001 FVH-2015-0002 etc

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Step 2 - Create your Administrators

Because Hallmaster is managed online, this means other authorised users can have access to the system along with different roles and permissions. Enter their First and last name and email address. Address details are not obligatory and if the administrator is also a customer you can add their activity later.

Tick the relevant boxes for their Roles and if necessary set them to 'Read Only' to restrict them from actually editing bookings and invoices. Please do NOT place a tick in the Customer box if they are an administrator.

You can now either just save them, or clicking on save and email will message them asking them to set their own password to give access to their Roles.

Step 3 – Hire Charge Rates

Here you can create ***names*** of different Rates for your Rooms and Facilities, eg. Standard Rate, Regular User's Rate, Commercial Rate etc. There is no need to set a rate name for each Room or Facility however as the ***amount*** for these rates is set in the Rooms/Facilities page and can be easily seen in the Charges Matrix once you have finished.

	Standard Rate	Regular User Rate
Room 1	15	10
Room 2	15	12

These Charges can then be linked in turn to your customers and more specifically to the activity they do.
For example Jenny Smith runs a Yoga Class and has the Regular User Rate.

Invoicing Module only- This will be used to automatically calculate the invoice you send to them for the rooms or facilities they have used. Otherwise they are there just for your reference.

Step 4 –Rooms and/or Facilities

i: Details
Firstly under the Rooms/Facilities section click 'Create New'.
Give it a title, eg Main Hall, Small Room, Playingfield 1 etc, and complete the rest of the information including a description of what the room could be used for and facilities available plus a picture. If you don't want to allow the public to be able to make booking requests, tick the box. *PLEASE NOTE – DO NOT ENTER A ROOM AS 'WHOLE HALL' or 'ALL FACILITIES'. Bookings are created for the Whole Hall or All Facilities by selecting ALL the rooms together.*

Ii: Images
You can upload some images to help promote the room or facility and these will appear in one of the website integration panels later

iv: Price Rates
You will see the names of the Hire Charges you set up previously. Just enter the hourly charge for each rate for this room or facility. To set up a charge for the 'Whole Hall', you will need to divide the Full Amount by the number of hours the hall is open for and either place it in one of the room charges. These amounts will be automatically calculated against each customer invoice for the amount of time they have spent using the Hall for their specific activity.

iii: Opening and Closing Times
The times you set here will be available to your customers when they make a booking request from the public view of the online calendar, but as administrator you can override these times

when adding and amending bookings. Please note that the times are in 24hour format and 00:00 is the START of the day and Midnight is pre-set to 23:59. These are an integral part of the system and cannot be changed.

Next tick the days of the week you wish to be open. A list will automatically appear below with the opening times. You can change these to have different opening times for each room or facility for each day of the week.

You can also choose to have different sessions or slots available to your customers, such as Morning, Afternoon & Evening. These slots can be flexible or fixed. It's up to you.

Timings are done on a ¼ hourly basis across the system

Click on Next to complete the Room Setup – you can always go back in and change any of the timings later if you want by clicking on Update Room Details. Add more rooms now or later.

Step 5 – Activity Groups

These are the main, general headings for the type of activity you have at your venue. Eg Classes, Meetings, Party, Wedding etc.

We recommend you keep these as a more general heading as you will link these to your customers later, along with more specific activities such as 'Yoga Classes', 'Pilates Classes' etc.

Once you have added your Activity Groups, if you are just using the Booking System you can now go to Step 7 on Customers. If you are using the Invoicing, please continue with Step 6 Hire Charges.

Step 6 – Additional Line Items – Invoicing Module only

As well as the hire charges, you can add additional items to your invoices. These are items that you regularly charge for eg. Deposits, Discounts, Table Hire, Chair Hire, Projector Hire, Alcohol Licence, PRS Licence etc.

These appear in a list when you create an invoice for a customer and can be selected along with the quantity.

Step 7 – Customers

This is more or less the same as setting up an Administrator but without the User Roles and Permissions. In the same way you set up an account for online shopping, once set up, and the customer has set their own password they can have access to their own bookings, invoices and payment history. They can also make additional booking requests from their account however the can **NOT** edit any exiting bookings. They would need to put in a request to the Bookings Administrator for this.

Step 8 - Bookings – Add, Requests, Amend, Single, Recurring/Regular, Display

Before adding any bookings, you need to make sure that you have completely set up you Hallmaster account including lists of Activities, Hire Charges and Line Items (if using the Invoicing) and your Customers.

Add a single booking
The booking process is similar to when you book a hotel online, so after selecting the rooms or facilities you require, select the start and end date of the booking or event.

Select the rooms or facilities for this booking, the name of the booking (eg, Parish Meeting) and the start and end date and time.

In the Customer section, start typing the customer's name or email address and as long as they are in your customer list, they will appear automatically, along with the relevant activity. If the customer has more than one activity linked to their account, you can select the one you want from the drop menu.

Enter a description for this booking. You can include a link to the customer's own website if you want as well.

Booking Privacy
Events are displayed in the calendar and the system according to their privacy settings as follows:

Public – bookings and contact details are displayed on the calendar. Ideal for classes and public events
Private – show as Private Event on the calendar with no access by the public apart from the timings of the event
Protected – similar to private but the booking will have a unique access code for only the organiser and attendees to be able to view the event details

Booking Status

Bookings can have a different status as follows:

Requested – This is a booking normally made by the public from the online calendar and waiting to be confirmed. Once made, the calendar displays this as a requested Booking until it is confirmed or removed.

If the invoicing module is enabled, you can raise an invoice against this type of booking and make sure you have received payment before changing the status to confirmed.

Confirmed – A definite booking. This too can have an invoice raised against it. This displays the booking name and details in the calendar, unless set to 'private'

Removed – These can be recovered and used again if required, left in the bin or deleted by an administrator!

Special Requirements

These are not visible by the public and appear against the booking in the printable list – ideal for assisting the caretaker when setting up the Hall or Venue

Admin Notes

Only visible by the administrator

Terms & Conditions

If you have entered a link to your T&Cs when setting up your account, you will need to tick this box before being able to proceed with the booking. If this is a requested booking, the tick will have been placed there already by the customer.

Create/Update/Send Booking Confirmations

Once you have completed the booking, you can send an email confirmation to the customer. The email is automatically generated and includes the booking details, plus the booking signature if you have created one. The system and calendar is updated automatically.

Add Recurring/Regular Bookings

As with adding a single booking, the process is the same all the way through apart from the use of the Recurring Booking tick box.

When you tick this, you will be shown the recurring options. Select which one you want and then add the number of occurrences. These will automatically appear in a list below.

Change or remove the dates and times that you know will clash with Bank and School Holidays or other bookings already in the system, and then proceed in the same way as you do for a single booking.

How to Manage your Booking Requests

People visiting your online calendar will be able to view availability for particular dates for the event they want to hold there. They can make a provisional or requested booking directly from the calendar and you will be automatically notified by email, and the calendar instantly updated to say that someone has made booking request.

You can then login to view the booking request and decide of you want to confirm it. To do this, click on Bookings and click on the Edit button next to the booking. This will now display the complete booking details. You can make any changes to the booking if necessary including the dates and times, then change the Status from Requested to Confirmed.

Finally, when you then click on Create Booking, you have the option to add your own comments to the automatic email that is generated. Click on Send and the event holder is automatically emailed to say that their event has been confirmed. If you don't want to send a message select Finish. This will update the calendar automatically.

Change individual dates in a recurring booking

In View Bookings, go to the booking you wish to View/Amend.
Click on the Amend Individual link to open the booking for that date and make the amendments needed, including different descriptions and rooms.
Please see separate sheets for Invoicing and Payment Tracking, and Setting up and using Multiple Administrators

SUPPORT – here to help!

http://support.hallmaster.co.uk
01929 509846 – option 2